

HELPFUL HINTS FOR COMPLETING THE OGE 450 CONFIDENTIAL FINANCIAL DISCLOSURE REPORT

1. Please report your full office address, including your room number in the "Branch/Unit and Address" box. Report the date you entered into the covered position in the "Date of Appointment" box. (NOTE: the date of appointment does not necessarily equate with your service computation date.)
2. Do not leave any schedule blank. If you have nothing to report with respect to a specific schedule, please check the "None" box.
3. Remember that the covered period for reporting on the OGE 450 is the preceding twelve month period, ending, for annual filers, September 30, 2005, and for new entrants, the date of filing.
4. Do not forget to include the income and assets of your spouse as well as the assets of any dependent children.
5. When completing PART I, for each asset identified you must provide an adequate description and the type of income generated by the asset. REMEMBER: Income sources must be listed as well. You must list the source of your spouse's salary in PART I (if your spouse also worked for the Federal Government, please indicate in a marginal note).
6. You must specify in PART I the underlying assets in any reportable IRA or Cash Management Account which you maintain, including the complete name of an investment fund (unless it is a publicly available mutual fund as indicated in the form's instructions). You may attach a computer print-out or broker's statement specifying the individual holdings in the portfolio if it clearly gives the required information. You must also list the underlying holdings in 401(k) plans (down to the level of individual "funds") or in any pension plans in which you control the investments.
7. When indicating stock holdings and other investments, indicate the company's full name and briefly describe the nature of the business, where that is not otherwise obvious. For mutual funds concentrated in a particular geographic area or economic sector, indicate the area or industry in which the fund is primarily invested.
8. Remember to complete the "Agreements and Arrangements" section in PART IV for both future and former employment. List any continuing ties you may have with your prior employer, such as a leave of absence, continued participation in a health or pension plan, etc. If known, it is helpful to indicate whether your pension plan is classified as a defined contribution plan or defined benefit plan, whether it is independently managed, and whether the plan is invested in the stock of your prior employer. The employee benefits brochure or handbook of your prior employer is usually a source for this information.
9. If you serve (paid or volunteer) as an officer, director, board member, or advisory group member of a non-Federal entity (other than a solely religious, social, fraternal or political organization), or provide professional or consultative services, or engage in teaching, speaking, writing or editing that relates to your official duties (or for a prohibited source), then you must submit a request for approval of outside activity (HHS FORM 520) to your supervisor and include this information in PART III.
10. Compensated outside positions listed in PART III, must also be reflected in PART I as an income source if over \$200 was received during the reporting period.
11. Retain a copy of the completed report form to assist you in filling out the report for the next cycle.